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ABSTRACT

This report describes the activities of the Council on Library Resources, Inc. (CLR) during the 1982-83 fiscal year. Contents include lists of members of the Council, the Council Board of Directors, and the Council staff; a listing of CLR committee members and officers; a preface; a brief statement of highlights of the year's activities and future directions for CLR; and sections devoted to activities in six specific program areas: (1) bibliographic services; (2) professional education, training, and research; (3) library management and services; (4) library resources and their preservation; (5) information technology and information delivery services; and (6) international standardization, exchange, and cooperation. Also included are a list of CLR program committees, task forces, and project participants; a listing of publications resulting from Council-supported programs and fellowships; financial information on CLR-support projects; the CLR financial statements for fiscal year 1983, accompanied by a statement from an independent accountant; a summary of CLR grant application procedures; and an index. (ESR)

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TWENTY-SEVENTH ANNUAL REPORT/1983

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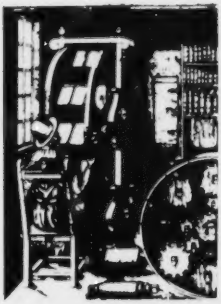

The scholar at his book-wheel is a reproduction of an engraving in Agostino Ramelli's *Le diverse et artificiose machine*. . .Paris, 1588. It first appeared in the Council's third annual report, with the following explanation: "the picture symbolizes the interest of the Council on Library Resources in both the content of books and the mechanics of library service." The engraving has appeared in each annual report since that time.

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Members of the Council and Members of the Board of Directors

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1. Elected at the November 1982 Members' meeting.

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Robert Vosper[3]

FINANCE COMMITTEE
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Fred C. Cole
Warren J. Haas
Louis B. Wright

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2. Deceased, May 1983.
3. Elected at the April 1983 Directors' meeting.
4. Mr. Haskins was elected to succeed Mr. Coles at the November 1982 Directors' meeting.

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	Keith W. Russell, *Program Associate*
	James L. Tew, *Accountant*
	Mary Agnes Thompson, *Secretary and Treasurer*

5. On leave of absence as of May 1, 1983.
6. Resigned, August 1982.

Foreword

It is easy to forget that the Council on Library Resources is really the small group of individuals who are the Members of the Council and who serve also as Directors of the legal entity that was created in 1956 to work on behalf of libraries and their users. The Members are the heart of the organization and it is they who have, for twenty-seven years, guided CLR's program and staff.

When a Member is lost, we are reminded of the true nature of the organization. Whitney North Seymour, Sr., joined the Council in the fall of 1958. He served enthusiastically during the twenty-five years that followed, the last eighteen as Chairman. A few days before the April 1983 meeting of the Board, Whitney expressed concern that he would not be able to fulfill his responsibilities. His death, three weeks later, saddened hundreds from many walks of life who knew well the full range of obligations he had assumed and fully met during his eighty-two years.

The record of his life reflected concern for individuals. He helped often by taking direct action and at other times by helping those who, though without his own remarkable skills for negotiating progress, shared his convictions and his willingness to act. The Members chose wisely when they asked him to take the lead in their cause. He was a powerful, humane, and gracious guide; his sense of humor balanced well his sense of purpose. His colleagues, who knew him, and librarians and users of libraries, many of whom did not know him at all, are equally indebted to him.

Warren J. Haas

Introduction

This *27th Annual Report* summarizes the activities of the Council's staff and records the work undertaken by many other individuals and organizations using funds provided by CLR grants and contracts. We think that the record can stand by itself, but each year as it is compiled we are reminded that the level of activity and the progress toward our objectives is possible only because a small Council staff manages to enlist the help of many of the most able and energetic of our colleagues. To use theatrical parlance, it is "the supporting cast of hundreds" that allows this particular show to go on.

Rather than reflect on the substance of the report we will, in these introductory notes, comment briefly on the status of one of the Council's primary (though subtly pursued) causes, encouraging academic and research librarians to understand fully the magnitude and importance of their obligations. In a sense, this is a new imperative stemming from the realities of our time. It is really a matter for attention by all librarians, not just those working in research libraries or academic institutions. However, the members of this particular group have had some special CLR attention for twenty-seven years and we continue to work at least part of the time in their cause.

In our twenty-fifth year, the Council's long-established activities to assist exceptional members of the profession and to encourage innovation in professional education were much expanded. On the assumption that the educational base of academic and research librarianship influences individual performance, we have encouraged efforts to enrich basic and supplementary professional education, to provide exceptional educational opportunities for present and prospective leaders, and to stimulate productive discussions about ends and means between librarians and faculty members of library schools, all with generally good results. But there is still a considerable gap between the responsibilities librarians now need to assume and at least some aspects of their performance.

We have also learned that there is a substantial difference between seeing gaps and filling them. Because we aren't certain how to proceed further, we have taken to asking questions of ourselves, and we will use a page or two of this report to share our own initial, uncertain, and still incomplete responses in the hope that this will help expand the base of discussion.

1. What should colleges and universities expect of their libraries and librarians?

Living as we are in a world flooded with information and, in some ways, dominated by those most skilled in its use, it is important that specific attention be given to the study of information as a discipline at every educational level. Especially in collegiate programs, where critical senses most need to be honed, it seems essential that consideration be given to such matters as the information systems supporting major disciplines, the structure and organization of knowledge, the economics of information, direct and indirect forms of censorship and other constraints on access, information quality and utility, and the public policy questions concerning information that, when they are finally answered, will affect the future of our society in fundamental ways. All librarians should be well informed on such topics and at least some must be able to teach not only the techniques but the substance of their calling. Colleges and universities should move to extend their programs into this area and should encourage library staff members to take the lead.

There is a comparable situation relative to research. Every aspect of library service and the basic structure of our information systems are in a state of flux. Given the centrality of these activities to so many segments of private and public life, the available, pertinent, and credible factual information needed to guide future change is inadequate and the level of research that might help add to our understanding is low. Broad-gauged, interdisciplinary research involving individuals from many fields is required. Librarians must encourage such research and, as partners in the academic enterprise, they have an obligation themselves to take part in the analytical work that is necessary if we are to understand better than we now do how information is generated and used, so that changes in the ways information is handled might provide better responses to the needs of users.

In addition to teaching and research there are other, more obvious, obligations. The provision of published materials and information in many other forms required for teaching and research is a fundamental and traditional charge, one that includes not only building, organizing, and maintaining a collection, but establishing and using links to the full range of organizations and information sources that supplement institutional capabilities.

Competent and often extensive assistance to users, working at all levels and in all disciplines, complements the resources themselves. The processes of identifying, locating, and obtaining publications and information resources generally have become complex and often costly. Users need training and librarians are responsible for providing it.

By extension, and because of their specialized knowledge, librarians, under special conditions, should take part in the development of resources for teaching and learning. The persistent complaint that the content of technology-based teaching and learning systems is no match for system capabilities is valid. The solution is to tap exceptional resources and teaching skills for use in the remarkable text and program storage and display systems that are now available. The quality of education, nationwide, can best be enhanced by extending access to distinction. Again, libraries and librarians have a role to play.

Universities necessarily expect that the management of their libraries will be responsibly, imaginatively, and productively accomplished. Libraries are costly enterprises and those costs must be contained even as educational goals are enhanced in every possible way. Libraries serve the present as well as the future and are a kind of microcosm of universities themselves. Their skillful management is difficult, but success is essential if costs are to be justified by the influence of library service on the quality of education itself. Universities and their libraries need to focus their efforts broadly on the overall operational needs and processes of the institution, not just on the traditional book-centered library, and they need to relate that effort to national and even international developments.

2. What do librarians need to do to meet such expectations?

No one individual can contribute usefully to all of the areas suggested in this still incomplete list of expectations for the profession. But the professional leaders of a collegiate or research library must, with appropriate support, collectively fulfill their obligations. Many individuals must develop an acceptable level of proficiency and maintain an active interest in some subject area, simply because a professional staff with strong academic credentials and a visible academic presence can extend the range of library service. Librarians need to learn to teach as well, and they need to be able to undertake substantial research responsibilities on topics of consequence.

Not every librarian must be a skilled administrator, but all must know what good administration is. Some few in every library must be specifically trained in the methods of management so that the organization, the funding, and the staff all can be brought to bear effectively on the work at hand.

In the same sense, there must be some who are skilled in the computer, communications, and text storage technologies that are now essential to library operations. These are skills that stem from full understanding of capabilities, costs, and future directions, not from the techniques related to use alone.

Finally, all must know of the history of the library as an institution; they must understand the importance of its archival role and its newer responsibilities to deliver information as well as items. The matters that affect the flow of information within disciplines, among institutions, through society, and across borders must all be seen to be as important as they truly are. In short, the concerns of the profession are matters of substance, not simply of technique. They are topics of academic and public importance, and the profession is responsible for seeing to it that they become matters of public concern to the wider academic and public communities as well.

3. What educational preparation is needed?

The intent, the content, and even the importance of professional education for academic and research librarianship are topics now under intense and even heated discussion. Should the focus be on underlying subjects, on the full range of practical matters that dominate daily operations, or on some combination of the two? Can the essentials be covered in a year of study or is a longer time required? Can some aspects of training be accomplished through working internships? How can continuing education meet the needs of a profession where the nature of the work is changing

in fundamental ways? Do library staffs need to be substantially reconfigured? Can expanded recruiting efforts interest prospects with the intellectual abilities and specialized talents that the obligations of the profession really demand?

How such questions are answered and, more important, how the answers are translated into action will measure the maturity of the profession and either set or remove limits on what it can contribute to teaching and learning. While our own views are still incompletely formed, if one accepts the general thrust of the conditions for performance and their implications as suggested here, then certain directions are implied. First, the focus of basic professional education will have to be on the topics underlying practice rather than on the practice itself. These are topics that are as intellectually demanding as any to be found. They are also of great importance not just to libraries but to scholarship and learning in general. When properly presented, these issues should appeal to individuals who are ambitious and energetic but who are also sensitive to matters of great public significance. Second, it seems unlikely that the required work can be fully accomplished in only one year, no matter how tightly organized the coursework or how intensive the schedule. To provide a valid base for future professional life, the subject matter has to be covered in detail, and the quality of instruction must be high.

While there is no intent to prescribe a curriculum, it is certain that instruction and extensive investigation are required in several key areas, most of them already elements to some degree in the curriculum of leading library schools. A simple enumeration of these areas would include information systems and information technology; the provision, use, and management of library resources for all disciplines; library operations and library management; scholarly communication, including its history, processes, and current state; research methodologies (including a substantial research undertaking) and, for many, continuing work in a subject discipline.

An intense, structured, basic professional program of this kind carries implications for subsequent training within libraries. The obligation that libraries would assume, as active participants in academic teaching and research, also anticipates changes in staff composition, organization, and patterns of compensation. That portion of library education most focused on academic and research librarianship would necessarily undergo major change to assure involvement of productive, research-oriented faculty members in sufficient numbers to build the critical mass that is essential for intellectual vitality, professional credibility, and enthusiastic university support. Most important, libraries—which is to say the profession itself—must view their obligations expansively and accept the disruptions to organization and habit alike that will come with turning talented and energetic people loose on the task to be done. The true meaning of participatory management will then be realized—the full assumption of responsibility by individuals for their own personal performance in the context of the goals of the college or university of which they are a part.

Warren J. Haas

Bibliographic Services

The Council seeks to encourage the development of a comprehensive, accessible, nationwide bibliographic record system. Providing ready access to bibliographic information, improving bibliographic products, and stabilizing costs of bibliographic processes in individual libraries are the primary objectives. The Bibliographic Service Development Program (BSDP) has made steady progress toward achieving these goals and, as a result, the National Endowment for the Humanities in 1983 made a $600,000 award for the program, to be matched by funds already committed by the Andrew W. Mellon Foundation. The award supplements a previous NEH/Mellon grant and other grants from the Carnegie Corporation of New York, the Commonwealth Fund, the Ford Foundation, the William and Flora Hewlett Foundation, the Lilly Endowment, and the Alfred P. Sloan Foundation. The total program budget is $6.2 million.

CLR relies on many expert individuals and groups to help plan and implement project activities. The Program Committee, a key force in guiding BSDP development, includes chief operating officers of the shared cataloging services and leaders in the library profession and in library technical services development.[1] Others help identify needed work by participating in conferences on such topics as subject access to bibliographic records and costs and features of online catalogs. BSDP support for the work of the Library of Congress Network Advisory Committee similarly has proved important for understanding current concerns and exploring possible courses of action.

Currently the Council's largest program, the BSDP made 18 new grants during fiscal 1983, and 24 grants were active at the end of the year. Major activities are described below.

Standards And Guides

Standard formats for recording and communicating bibliographic information help ensure compatibility of bibliographic products. Not only local, regional, and national agreements are involved; international commitments also are needed to secure American libraries' access to bibliographic products of other nations. BSDP-sponsored work on standards supports both national and international activities.

[1]Members of the BSDP Program Committee are listed on page 38.

Standard Network Interconnection (SNI)

Building a comprehensive nationwide bibliographic record system requires linking computer systems. In order to do so, it is necessary to establish telecommunication protocols, or sets of rules that govern how information is transferred from one computer to another. In the BSDP Linked Systems Project (LSP), the Research Libraries Group (RLG), the Washington Library Network (WLN), and the Library of Congress (LC) are developing and implementing these rules as the Standard Network Interconnection. The OCLC Online Computer Library Center has participated in technical planning, but has no present commitment to use the protocols.

International principles for computer linkage have been specified in the International Standards Organization/American National Standards Institute Reference Model for Open Systems Interconnection. The model is designed as a logical structure consisting of seven layers, or sets of rules. Each layer accepts information from the layer preceding it, performs needed functions, and transmits results on to the next layer. Because the lower layer protocols already have been formulated, the SNI project concentrates on the upper layers. When completed, the computer system links also can be used for purposes other than the exchange of bibliographic records.

During fiscal 1983, protocol specifications were completed and participants prepared for full SNI testing. A successful communication link between the LC and RLG computers early in the year utilized a portion of the protocols. Work done in the BSDP Linked Systems Project is being coordinated with the American National Standards Institute Committee Z-39, Subcommittee D (Computer-to-Computer Protocols).

Application Level Protocol

The top layers of the telecommunication model are the application and presentation layers. They contain features necessary to implement specific functions such as bibliographic searching and record maintenance. James Aagaard of Northwestern University completed work on the application level protocol early in 1983 and submitted his final report to the Council, LSP participants, and American National Standards Institute Subcommittee D. Investigations into similar work in Canada revealed that it is not possible to make the U.S. and Canadian protocols identical at this time, but it is probable that they eventually will be compatible.

American National Standards Committee Z-39

The Council continues to provide funds for some activities undertaken by the American National Standards Institute (ANSI) Committee Z-39. The committee is responsible for formulating standards in library and information science and related publishing practices. A two-year grant made in June 1982 supports work relating to several topics of interest to CLR: standards on book paper quality, recording information about library holdings, and telecommunication protocols. In May 1983, the committee used CLR funding to hold a joint meeting of two subcommittees working on aspects of the holdings statements.

Serials Cancellation

The Pittsburgh Regional Library Center has submitted a final report on a project to develop a method of recording and communicating serials cancellation decisions via an online union list. During the two-year project, 1,234 cancellation reports were received from 22 college and university libraries in Pennsylvania and West Virginia and made available online. The reports will help libraries make better-informed decisions about acquisitions and cancellations.

Romanization of Southeast Asian Languages

Because librarians often use bibliographic descriptions written in languages that they do not read, they must depend on romanized equivalents of descriptions in non-roman languages. The Committee on Research Materials on Southeast Asia (CORMOSEA) of the Association for Asian Studies is developing standard romanization systems that are machine-convertible. Automatic conversion systems have been designed for Khmer and Burmese, and the committee is working on converting Thai. In May 1983, CLR provided funds to send a CORMOSEA representative to the Sixth Congress of Southeast Asian Librarians in Singapore to help promote a universally acceptable romanization scheme.

MARC Format for Holdings and Locations

In November 1982, the University of Florida hosted an invitational conference to review the design and plan the implementation of the proposed MARC (MAchine-Readable Cataloging) format for locations and holdings. The format is being developed by the Southeastern Association of Research Libraries Cooperative Serials Project, in conjunction with the Library of Congress. Libraries will use the proposed standard to record detailed holdings and locations in a machine-readable union list.

Linking Bibliographic Databases

When the BSDP was established late in 1978, libraries were able to catalog materials online through shared cataloging services such as OCLC, the Research Libraries Information Network (RLIN), and WLN. However, users of one service could not gain access to records in the others' databases—a situation that still exists. Moreover, as more systems become available and equipment costs decrease, many libraries are finding it possible to create their own online operations, thus curtailing prospects for more record sharing.

While nationwide access to bibliographic records is a BSDP goal, there are obstacles to improvement: existing databases are not consistent, and the technical requirements for linking computer systems are only now being identified. The projects described below address these problems. The work has implications for all libraries and systems. In addition to bibliographic record sharing, the computer links may eventually benefit reference searching, resource sharing, and preservation activities. They also may be used to communicate interlibrary loan requests and messages.

Linked Systems Project

The Linked Systems Project (LSP) is intended to develop telecommunication links between the computer systems of three organizations: the Library of Congress (LC),

the Research Libraries Group (RLG), and the Washington Library Network (WLN).[1] Both the technical links and the structure of the records to be transmitted are included in this work. The technical work is described in the section on the Standard Network Interconnection (see above, page 13).

When work on the LSP began, the three systems had different technical and bibliographic capabilities. The first priority was to identify these differences and establish ways to exchange and update records across systems. An authorities group worked to specify methodology and a telecommunication group addressed the task of designing the system links. During the second phase of the project, each organization constructed functional specifications for its own system and helped to define and design the intersystem facilities.

Authorities Implementation Project

LSP participants now are preparing to use the newly developed links. The first implementation will consist of authority file searches and responses, using the Standard Network Interconnection. Software needed to accomplish the dialogue between systems is being developed in the Authorities Implementation Project, which began in October 1982 and will conclude in late 1984.

The capabilities needed for implementation include search and response features, record transmission, and record distribution. Initially, these capabilities will support the cooperative creation and maintenance of the Name Authority File Service (see below). The record contribution and distribution capabilities also can be used later for other applications.

Name Authority File Service (NAFS)

Early planning to link systems revealed that if differences among participants' databases were not reconciled, searching files in different systems would be difficult, expensive, and inefficient. To help deal with this concern, the BSDP proposed developing a name authority file that might be used by all libraries. A Task Force on a Name Authority File Service has worked on requirements for the service, which will be operated by the Library of Congress as part of the Name Authority Cooperative Project (NACO).[2]

The NAFS goals are to build a nationwide authority file using records contributed by selected institutions and to make the file available to all libraries. The LSP will provide the capabilities for online search, response, and contribution of records. The Task Force has developed requirements for the content and maintenance of the file, and these requirements have been integrated into LSP planning. During fiscal 1983, the "Requirements Statement for a Name Authority File Service" was revised and final plans for the service were in preparation.

Bibliographic Analysis

After authority records are exchanged, the SNI will be expanded to include other bibliographic records. In April 1983, WLN, RLG, and LC began an 11-month

[1]LSP participants are listed on page 38.

[2]Task Force members are listed on page 38.

bibliographic analysis project to plan new uses of the system links. The three organizations will analyze requirements and develop specifications for other exchanges.

Access To Bibliographic Data

The Council has funded a number of projects to make bibliographic records more readily accessible. The BSDP online public access catalog evaluation, completed this year, was the first research project to obtain data on reactions to online systems from a large number of users working with different catalogs. Additional work was undertaken to further analyze the study data and its application to other topics: for example, the relationship of online catalog features to costs and the development of training programs for online catalog users

Online Public Access Catalog Evaluation Project

Participants in the Council's two-year study of online public access catalogs submitted their final reports during fiscal 1983. Five groups conducted the evaluation: the Library of Congress, J. Matthews & Associates, OCLC, RLG, and the University of California's Division of Library Automation. During the first phase of the project, all worked to develop methodology, data collection instruments, and evaluation tools. Dartmouth College Library, Northwestern University Library, and Stanford University Libraries received grants to help develop the instruments and test the questionnaire. Preliminary data from the pilot tests were made public in January 1982. The main data collection effort took place during the spring of 1982 and the first results were reported at the end of June.

The study focused on assessing users' reactions to online public access catalogs and gathering suggestions for improvements. Over 7,000 online catalog users at research, college, community college, public, and government libraries provided information, and 3,000 persons who had not used online catalogs also were queried. In all, 17 different online catalogs at 29 institutions were included.

The evaluation provides extensive information about the acceptance and use of online catalogs. Researchers reported high satisfaction with existing online catalogs, but also noted great diversity among the systems and identified a number of areas in which users would welcome improvements. Study findings have been widely publicized. A major synthesis of the data, *Using Online Catalogs: A Nationwide Survey*, was published by Neal-Schuman in June 1983. Project reports from all participants will be made available through ERIC.

Online Public Access Catalogs: Additional Study

Reports of the online catalog evaluation provide summary information, but the initial analyses do not fully exploit the wealth of data collected. The Council has contracted with J. Matthews & Associates, in cooperation with the University of California, to undertake a more detailed exploration of differences in systems, databases, and support services, and of characteristics of user and nonuser groups. This comparative work will provide a better understanding of how local characteristics

influence use. Results may be used to help administrators evaluate their own institutional needs and control investments of time, staff, and money.

Online Public Access Catalogs: New Directions

The project reports of the online public access catalog evaluation made suggestions for additional work, including consideration of the characteristics and costs of online catalogs and the design and improvement of user training programs. Exploratory meetings on both topics were held during fiscal 1983. Another product of the study, Charles Hildreth's *Online Public Access Catalogs: The User Interface* (Dublin, Ohio, 1982), described the great diversity among existing systems. Those who use more than one system have to cope with differing command languages and screen displays. To address this topic, the BSDP has planned a meeting of system designers to take place in the fall of 1983.

Online Public Access Catalogs: Costs and Features

Relating specific features of online catalogs to costs of design, installation, and operation has proved difficult. The BSDP provided a grant to researchers at the University of California Systemwide Administration to investigate this topic and produce a report: *Costs and Features of Online Catalogs: The State of the Art*. J. Matthews & Associates and Charles Miller, Florida State University, helped prepare the final draft of the publication, which is available through CLR as a reprint of an *Information Technology and Libraries* article.

To explore planning and managerial issues related to online catalogs, the BSDP sponsored a three-day conference for 27 library directors and system designers in December 1982. Participants assessed the implications of the online catalog study and discussed fiscally responsible ways to improve the catalogs. Part of the discussion centered on the draft report on costs and features described above. David Bishop, University of Georgia, prepared an analysis of the study data that was collected in Association of Research Libraries member libraries. His paper is included in the report on the conference, *Online Catalogs: Requirements, Characteristics and Costs*, issued by CLR in March 1983.

Online Public Access Catalogs: User Instruction

To provide an opportunity to share information about methods of instructing online catalog users, the BSDP, in cooperation with Trinity University, sponsored a meeting in San Antonio in January 1983. Thirty-five librarians, network representatives, and vendors interested in assisting users of online catalogs attended the three-day event. Participants considered needs of users, current training programs, and prospects for improvements. Proceedings of the meeting will be published late in the summer of 1983.

Northwestern University has received a BSDP grant for a 16-month project to develop methods of educating online catalog users that can be adopted by academic libraries using various online catalog systems. The work also includes preparation of guidelines for planning and evaluating online catalog user education programs.

Association of Research Libraries Microform Project

ARL's two-year project to help improve bibliographic access to the contents of microform collections continued during fiscal 1983. A survey of microform bibliographic control activities provided detailed information on cataloging projects. Among other activities, the Association has established a clearinghouse for information on the cataloging of microforms, including libraries' expressed priorities for cataloging specific microform series.

Machine-Readable Data Files

The Research Libraries Group has received a grant to cover costs of a task force working to improve access to machine-readable data files. RLG will include bibliographic records for the data files in its Research Libraries Information Network. The task force includes representatives from RLG institutions and from universities and data archives outside RLG. Work will build on the existing MARC format and on Sue Dodd's *Cataloging Machine-Readable Data Files* (Chicago, 1982), which was supported by a previous CLR grant.

Manuscripts in Machine-Readable Form

The Association of American Publishers (AAP) has been awarded a CLR contract for a two-year project to develop industry-wide standards for preparing and processing electronic manuscripts. Aspen Systems Corporation, the contractor, will survey existing practices and develop a proposed standard system of command codes, keyboarding conventions, and author guidelines for preparing manuscripts by machine. A seven-member team composed of representatives of AAP's Electronic Publishing Subcommittee, CLR, and the National Bureau of Standards will oversee the work, with the assistance of a review board composed of representatives from libraries, library schools, book trade associations, professional societies, publishers, and authors. The University of Chicago Press has offered to incorporate the guidelines in a future edition of *The Chicago Manual of Style*.

Humanities Texts in Machine-Readable Form

Rutgers University is building an international inventory of machine-readable texts in the humanities. Information on existing texts has been collected through questionnaires sent to individuals and to major European and American institutions. The data are entered into the Research Libraries Information Network (RLIN) to expedite access, and a computer output microfiche catalog also will be produced. CLR support was used to organize the project, develop record formats, and create a sample database.

Conversion Of Serials (CONSER)

CONSER is a cooperative effort to build a database of bibliographic records for serial publications.[1] Eighteen North American libraries have contributed bibli-

[1]For a description, see Annual Report XXV:21.

ographic records to the database, which is available in machine-readable form and on microfiche. The Council provides assistance for several CONSER-related projects.

National Library of Canada (NLC)

To assist CONSER participation by the National Library of Canada, CLR continues to support its U.S. telecommunication costs, and in 1978 provided funds for a register/index listing of authenticated CONSER records in computer output microfiche format. *CONSER Microfiche* contains cataloging information for CONSER records that is independent of a computerized system. It is produced by NLC in cooperation with the Library of Congress and is distributed by both libraries. To date, over 150,000 serial publications have been authenticated—that is, the bibliographic information has been checked to make sure that it is correct and complete—and added to the list. The fourth annual supplement to *CONSER Microfiche* will be produced in 1983.

Theological Journals

In 1979, the Boston Theological Institute (BTI) began adding over 8,700 unique titles in religion and theology to the CONSER database. Taken together, the nine BTI collections constitute one of the most comprehensive collections of theological periodical literature in the world. In March 1982, CLR provided a supplemental grant to help support communication costs for converting the remaining 1,650 bibliographic records. The project is scheduled to be completed by the end of 1983.

Abstracting and Indexing Coverage

Last year, the Council provided a planning grant[1] and, this year, partial support for a project undertaken by the Association of Research Libraries (ARL) and the National Federation of Abstracting and Indexing Services (NFAIS). Work will begin in September 1983. ARL and NFAIS will enrich the CONSER database by adding information on the coverage of titles by abstracting and indexing services. Participants will also ensure that the database includes a core group of widely used serials, and will supply standardized bibliographic data—i.e., ISSN, key titles—to the abstracting and indexing services so that indexed serials can be cited in standardized form. The National Endowment for the Humanities and the H.W. Wilson Foundation also are providing funds.

Bibliographic Products And Services

A comprehensive bibliographic database provides the raw material for bibliographic products and services. BSDP activities include evaluating the quality and utility of such products and clarifying users' needs for additional services. Of special interest is finding ways to meet the needs at acceptable costs, using existing capabilities.

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[1]See Annual Report XXVI:19.

Library of Congress Subject Headings (LCSH)

Pauline Cochrane has worked with the Library of Congress Subject Cataloging Division to strengthen the *Library of Congress Subject Headings*. As a result of her work, LC asked designated libraries to contribute additional cross-references for established headings and suggestions for new headings. At the conclusion of the project, four libraries had begun submitting cross-references for LC approval. A report on this project is available from the Council.

In the spring of 1983, the Council provided funds for another subject heading project. Lois M. Chan, University of Kentucky, received a grant to revise her text, *Library of Congress Subject Headings: Principles and Application*. First published in 1978, the book includes discussions of both theoretical and practical aspects of LCSH. The new edition will include material on subject heading changes influenced by AACR-2 and a study of LC subject headings in online public access catalogs.

AACR-2 Catalog Headings

C. Donald Cook, University of Toronto, is using machine-readable MARC records to assess differences in AACR-2 applications in four national libraries: the National Library of Australia, the British Library, the National Library of Canada, and the Library of Congress. His work focuses on variations in headings for corporate bodies, using headings assigned in 1981. However, programming done for the study can be used to analyze other types of headings and other time periods. By May 1983 Cook had analyzed 25 percent of the headings.

Bibliographic Records on Microcomputers

Victor Rosenberg, University of Michigan, has received CLR funding to complete computer programs that will allow individuals to extract records from databases such as RLIN and OCLC and to reformat and store citations. The records are formatted according to the American National Standard for Bibliographic References (ANSI Z39.29-1977). Software for the Apple, Terak, and IBM personal computers has been completed; it also will be available for other microcomputers. The project also received support from OCLC, the Alfred P. Sloan Foundation, and the University of Michigan.

Professional Education, Training And Research

Matters pertaining to library education, training, and research were prominent on the CLR agenda in 1983. On the assumption that the quality of education significantly affects professional futures, special attention has been given to both basic and continuing education programs. The Professional Education and Training for Research Librarianship (PETREL) program was established in 1980, supported by grants from the Carnegie Corporation of New York and the Andrew W. Mellon Foundation.[1] During fiscal 1983, the Pew Memorial Trust made a $430,000 grant to the Council for PETREL activities. Part of the funding supports cooperative research projects proposed jointly by faculty and librarians. The Pew grant also will support efforts to explore questions relating to librarianship and educational preparation, as described in the Introduction to this report.

During fiscal 1983, ten students graduated from the PETREL-sponsored programs at the Universities of Michigan and Chicago. Twenty-nine senior library administrators have participated in the Senior Fellows program begun in 1982 at the University of California, Los Angeles. Leaders in the profession have attended two PETREL-sponsored Frontiers Conferences intended to help build understanding of future library needs. Another CLR program for librarians who wish to extend their experience, the Academic Library Management Intern Program, has resumed following evaluation.

Professional Education Programs

Basic Professional Education

At the University of Michigan School of Library Science, specially recruited, highly qualified graduates of liberal arts and sciences programs are pursuing a new two-year curriculum in research librarianship. The first four CLR Fellows graduated in April 1983. In addition to library science courses, all students complete interdisciplinary course work and one-term internships at research libraries. A second class of six Fellows entered the program in September 1982, and a third class will begin work in September 1983. Support for the program, primarily for student aid, will continue at a reduced level during the third year.

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[1]Members of the PETREL Program Committee are listed on page 39.

Advanced Study in Library Management

During 1982/83, CLR supported the University of Chicago Graduate Library School's experimental postgraduate course designed to prepare working professionals for senior management responsibilities. In June 1983, six students completed a year-long curriculum that included courses in the school of management and the library school and concluded with an investigative internship.

PETREL support for this program provided tuition assistance and stipends for the students. A decision has been made not to continue the program, principally because of recruiting difficulties.

Senior Fellows

The Senior Fellows program began in August 1982 at the Graduate School of Library and Information Science, University of California, Los Angeles. It provides specialized management instruction for selected senior library administrators. During a six-weeks' residency at UCLA, Fellows complete interdisciplinary coursework, a seminar on issues in academic library management, and tutorials. They also define a research problem to be investigated during the remaining months of the year-long program. Planned to develop a sense of community among research librarians and library school faculty as well as to hone individuals' management skills, the program will continue with CLR support for at least a third year. The 1982–83 class consisted of 12 library administrators and one library school faculty member. A second class of 16 will convene in August 1983.[1]

Professional Cooperation And Research

Frontiers Conferences

The Council's *26th Annual Report* described the first Frontiers conference, held in December 1981. The conference was designed to bring librarians, library educators, university officials, and others together to discuss current issues and future library needs, and it received high ratings from participants. The PETREL committee solicited proposals for further conferences and subsequently awarded a $33,000 grant to the University of British Columbia School of Librarianship. At this second invitational meeting, held in June 1983, 32 participants met to discuss "Changing Technology: Its Impact on Scholarly Communication, Research Libraries and Education for Librarianship and Information Science." Proceedings of both meetings will be published.

Faculty-Librarian Cooperative Research Projects

As part of the PETREL program, the Council funds research projects conducted by teaching faculty and senior staff members of academic and research libraries. The objectives of the program are to stimulate high-quality research and to bring librarians and faculty together to work on library problems. Grants of up to $3,000 are provided to cover incremental costs incurred for organizing data, hiring interviewers,

[1]Senior Fellows are listed on page 39.

and computer time. Proposals are reviewed semiannually by members of the PETREL advisory committee and CLR staff.

During fiscal 1982/83, 35 proposals were received, and 16 were funded:

Julia Gelfand and John King, University of California, Irvine: a study of the effects of consolidation in a university library, including economies of scale and the preservation of services to multidisciplinary research units.

Kathleen Heim and Paula Watson, University of Illinois: a study of the use of government documents in a large research library.

Patricia Reeling, Daniel O'Connor, and Mary Fetzer, Rutgers University: an investigation of the extent and nature of use of the government publications collection at the university library.

Thomas Martin and John Wyman, Syracuse University: development of techniques to analyze searches in the library's online public catalog so that library staff can identify and test modifications to the system or to user documentation.

Ben-Ami Lipetz, State University of New York at Albany, and ***Peter Paulson,*** New York State Library: measurement of the impact on users of the addition of online subject searching capability to the catalog of the New York State Library.

Malcolm Getz and Douglas Phelps, Vanderbilt University: an investigation of technical services costs in university libraries.

Beth Shapiro and Philip Marcus, Michigan State University: an assessment of the success rate of library users in retrieving materials located in the main library.

Robert Swisher and Rosemary Du Mont, University of Oklahoma, and ***Calvin Boyer,*** University of California, Irvine: a study of the extent to which female academic/research librarians seek administrative positions.

Ruth Patrick and Robert Booth, Wayne State University: a study of the introduction of microcomputers in the university library.

Cynthia Dobson, Paula Morrow, and Dilys Morris, Iowa State University: an investigation of the impact of a new building on job satisfaction and job performance.

Terrence Brooks and John Forys, Jr., University of Iowa: an evaluation of the efficiency of eight forecasting methods for library circulation statistics, and development of a forecasting method for library statistics that can be performed with a desk calculator.

George D'Elia, Andrea Hinding, and Cerise Oberman, University of Minnesota: an analysis and evaluation of the document delivery service provided for faculty members in six academic units.

Anne LeClercq and Ernest Brewer, University of Tennessee: development of a model for providing library resources and services to college-bound high school students.

Jordan Scepanski and Edwin Gleaves, Vanderbilt University: an investigation of the information needs, habits, and attitudes of faculty members of the George Peabody College for Teachers, Vanderbilt University.

Leonard Geddie, Elizabeth Dolan, and Alexis Jamieson, University of Western Ontario: an investigation of the relative value of keyword search capabilities and authority control in an online catalog.

Marcy Murphy, Indiana University, and ***Martha Bailey***, Purdue University: identification of managerial competencies in research libraries at four professional levels.

British Academic Library Research Funding

Jovana J. Brown, Evergreen State College, has completed a study of the work of research units established by Great Britain's Office of Scientific and Technical Information (OSTI). Ms. Brown used CLR funds to conduct her inquiry at libraries hosting the research units. She analyzed the effects of the units on the academic libraries' services, operations, and applications of computer technology, as well as the utility of this organizational model for U.S. libraries.

Academic Library Management Intern Program (MIP)

The objective of the Management Intern Program is to add to the number of experienced and capable individuals available for senior administrative positions. A comprehensive review of the nine-year-old program during fiscal 1982 verified its worth, and the Council consequently reinstated the internships for 1983. The length of the program has been reduced from ten to nine months to coincide with the academic year.

Five interns were chosen from a group of 90 applicants for the 1983–84 program, bringing to 40 the total number of participants.[1] A review of career paths of past interns demonstrates rapid professional progress: 11 are currently library directors, 11 hold assistant or associate director positions, and 5 are department, branch, or division heads.

The current interns are:

Jill B. Fatzer, B.A., Tulane University (1964); M.L.S., University of California, Berkeley (1967). Ms. Fatzer, who is head of the reference department, University of Delaware Library, will intern with Millicent Abell, university librarian, University of California, San Diego.

Susan F. Rhee, B.A., San Diego State University (1968); M.L.S., University of California, Los Angeles (1973). Currently head of the catalog department, University of California, San Diego, Ms. Rhee will work with Patricia Battin, vice president and university librarian, Columbia University.

Gordon S. Rowley, B.A. and M.A., Stanford University; M.A. in library science (1976) and Ph.D. in Musicology (1979), University of Iowa. At Northern Illinois University, Dr. Rowley is associate professor and assistant director for research services. He will intern with Charles Churchwell, dean of library services, Washington University, St. Louis.

Helen H. Spalding, B.A. (1972) and M.A. in library science (1974), University of Iowa. Now at the University of Missouri, Kansas City, as head of technical services, Ms. Spalding will work with John McGowan, university librarian, Northwestern University.

Sarah E. Thomas, B.A., Smith College (1970); M.S.L.S., Simmons College (1973); Ph.D. in German literature, Johns Hopkins University (1982). Dr. Thomas, who is manager of library coordination, Research Libraries Group, will travel to the University of Georgia to work with David Bishop, director of libraries.

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[1]Members of the selection committee are listed on page 40.

Library Management And Services

In the 1980s, libraries operate in a more complex setting than ever before. New technologies provide the means for improving both operations and services, users are categorized on the basis of technical expertise as well as differing needs and expectations, and a variety of information services and products is available commercially. Both within the profession and outside, important questions are being raised about the library's role in a technology- and information-oriented society. A central concern in this volatile environment is how institutions can adapt what is new to carrying out traditional tasks—providing support for information needs, scholarship, and research.

Many issues and problems implicit in these changes are management-related. Chief among them are financial considerations—budgeting, costing, and funding. Requirements for accountability and improved efficiency have led to renewed efforts to evaluate and refine management practices. Adapting library services to institutional changes and helping students and faculty become aware of library innovations that affect research are equally important. However, in many institutions, staff skills required to carry out program evaluation and change are at a premium.

The Council has funded many programs addressing these needs, primarily through the Office of Management Studies of the Association of Research Libraries (OMS-ARL), which has received CLR assistance since its inception. Other current grants are described below. A major program study of research library economics and financial management is planned for late 1983.

Academic Library Program

Council support for the Academic Library Program of the Office of Management Studies, ARL, continued in 1982/83. The program consists of six separate self-study procedures for academic and research libraries plus a consultant training program. The self-studies help libraries improve management and plan for change through collaboration between OMS staff, the library director, and library staff. Self-studies are available in general management, collection analysis, preservation planning, programs for mid-sized and small academic libraries, and public services. Nearly half of all ARL member libraries have conducted self-studies since the OMS began its programs in 1972.

The Consultant Training Program (CTP) started in 1979 with the intent of providing selected librarians with the skills and experience to assist library planning, self-study, and training programs. During 1982, a third class of consultant trainees was chosen, raising the number of CTP participants to 55. A fourth class of 22 will be trained in the fall of 1983. Council support for the CTP ends with the completion of 1983 training activities.

Archives Self-Study and Review

The Society of American Archivists has completed a project to design a self-assessment and peer review process for archival agencies. CLR funding made it possible to test the process at six institutions. The guide for the program, titled *Evaluation of Archival Institutions: Services, Principles, and Guide to Self-Study*, was published this year.

College Library Program

The College Library Program began in 1969 as a joint CLR-National Endowment for the Humanities effort to increase the library's role in undergraduate education. Now in its final year of operation, the program has assisted 35 libraries in designing instruction-related activities. Many have reported that institutional resources are being provided to continue the programs. During the fiscal year, DePauw University, Northwestern University, and Tusculum College submitted final reports on their activities. The remaining participants, Franklin and Marshall College and Lake Forest College, are scheduled to finish the program by the year's end.

Faculty-Library Communication

In 1981, CLR funded the Association of Research Libraries and the American Association for the Advancement of the Humanities as they sought to provide faculty members with information about key issues facing research libraries. Activities included distributing a bimonthly newsletter, *Library Issues*, to faculty at three institutions: the University of Colorado; the University of North Carolina, Chapel Hill; and Princeton University. A final report on the project noted that, while the newsletter was useful, most faculty members prefer a locally produced publication tailored to their own campus community. Based on this outcome, project participants recommended that ARL directors and the ARL Board consider what role the Association might play in improving campus-based library communications with faculty.

Bibliographic Instruction Workshops

Through grants to Earlham College, including one in 1983, the Council has supported a series of workshops to bring faculty and librarians at many institutions together to seek improved methods for integrating the library into academic life. These workshops have been successful, and their design is being adopted for other programs to expand faculty-library cooperation, including the two described below. Because the value of this work appears well established and costs are modest, future CLR financial assistance seems no longer needed.

A small grant went to *Whittier College* for travel and accommodation costs for Earlham College faculty invited to conduct a demonstration workshop in 1984. This replication of the Earlham program is intended to provide a west coast workshop for area faculty since participation at Earlham has been mostly by midwesterners.

Ohio State University received support for an April 1983 colloquium for faculty from other research universities, primarily in the Great Lakes area. Building on three years' experience with user education colloquia and the Earlham model, the OSU conference emphasized faculty-librarian partnerships to improve research techniques of both graduate and undergraduate students. The conference drew 110 participants, including 14 faculty members and 26 librarians from other institutions.

Access to Materials in Storage

At the University of Michigan, library staff members are investigating faculty attitudes toward remote storage facilities. An extensive program involving removal of nearly one million volumes from the main library over a ten-year period provided the impetus for the project. Participants will assess the acceptability of improved bibliographic access to the stored collections as a substitute for proximity. A grant from the Andrew W. Mellon Foundation supports conversion of bibliographic records for the stored materials into machine-readable form. This will permit library staff to improve bibliographic access by installing terminals in three humanities and social sciences departments most affected by the move. Staff will conduct a training program for users of the computerized catalog.

Library Resources And Their Preservation

CLR activities related to library collections fall into several categories. The Council's interest in preservation continues, especially in efforts to expand understanding of preservation problems and the physical characteristics of materials. Some support also has been provided for the production of aids to research and professional instruction, including, this year, an index to microform collections and preparation of a new edition of a text on science and engineering libraries.

With a growing acceptance of cooperative collecting, a need to promote standardized evaluations of library holdings has become evident. Several CLR projects support the development of appropriate methodologies for collection evaluation.

Committee on Production Guidelines for Book Longevity

The Committee on Production Guidelines for Book Longevity began its work to set guidelines for durable paper and bindings in 1979.[1] Its final report, titled *Book Longevity*, appeared in December 1982. The 19-page pamphlet contains a summary of the Committee's conclusions concerning book paper and book bindings. Both reports also appeared in *Publishers Weekly*.

Book Longevity has drawn both national and international attention, and has helped focus attention on both preservation and current book production methods. The committee's work also was described in the February 16, 1983, issue of *The Chronicle of Higher Education*.

Standard for Permanent Paper

Part of the CLR support for American National Standards Institute Committee Z-39 is intended to assist preparation of a standard for permanent paper for printed library materials. A draft of the proposed standard, based in part on the work of the Committee on Production Guidelines for Book Longevity, was completed in the fall of 1982.

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[1]Members of the Committee are listed on page 40.

ALA Preservation Conferences

The Council provided a grant to the Resources and Technical Services Division, American Library Association, to help pay expenses of speakers for a series of four preservation conferences to be held during 1983–85. The conferences are co-sponsored by the Library of Congress' National Preservation Program. Each event is planned for a specific audience within the library community: directors, preservation administrators, and preservation staff specialists. The objectives are to encourage local support for library preservation programs, to help educate those responsible for the programs, and to offer basic training in repairing materials. The first conference, held in April 1983 in Washington D.C., was titled "Library Preservation: the Administrative Challenge." More than 50 library administrators, foundation and association staff members, and publishers attended. The second meeting is planned for April 1984.

Byzantine Bindings

Duke University received a grant in early 1982 to enable John Sharpe III, rare books curator, and Guy Petherbridge, an independent consultant, to complete research on Byzantine bindings. Working at the Monastery of St. John on Patmos, the two are constructing a profile of manuscript leaf-books, or codexes, to add to what is known about early bookbinding practices and the properties of codex materials. Because the project has been delayed due to renovation at the Monastery, the grant period has been extended through September 1983.

Conservation Internships

Nancy Bell, an apprentice bookbinder at the Eisenhower Library, Johns Hopkins University, has received a grant to complete internships in England over a nine-month period, working with conservators at five institutions and with one independent conservator. This experience will enable her to provide documentation on archival and library preservation practices in England for the professional literature, as well as broaden her own knowledge and skills.

Index to Microform Collections

Ann Niles, Carleton College, received a grant in December 1982 to produce a guide to microform collections not otherwise indexed. Publishers' reel guides to 26 microform series provide the basis for her book, which will be arranged by series, with author and title indexes.

University Science and Engineering Libraries

Ellis Mount, who published the first edition of his *University Science and Engineering Libraries* (Westport, Conn., Greenwood Press, 1975) as the result of a CLR fellowship award, has received a grant to expedite preparation of a second edition of the book. Mount will visit 15 university and college science and engineering libraries to gather data and to interview staff members and library users.

Leaders in American Academic Librarianship

A three-year project to produce essays on 15 academic library leaders active during 1925–1975 has been completed, and the resulting anthology will be published by Beta Phi Mu as number 16 in its *Chapbooks* series. Five of the essays have appeared in the *Journal of Academic Librarianship*. Participants also conducted oral history interviews in the course of their research, and transcripts of five of these interviews have been forwarded to archival collections.

Use of Library Materials

Paul Metz, Virginia Polytechnic Institute and State University, has used a CLR grant to study the use of VPI library materials. His investigation focused on the extent to which faculty and students rely on the literature of their own disciplines and the extent to which they depend on materials in other areas. Circulation records from the Library's automated system provided much of the information, and limited data on journal use also is included. Titled *The Landscape of Literatures*, Metz' study has been published as number 43 in *ACRL Publications in Librarianhip*.

Collection Assessment

The Office of Management Studies, Association of Research Libraries (OMS), coordinated a collection assessment project at four member libraries of the Cooperative College Library Center, Atlanta. The project involved testing an assessment manual produced as part of an earlier CLR project. Each library received a grant to collect information on local collection use and collection development. Final reports have been received from Atlanta College of Art, Dillard University, and Tougaloo College; Tuskegee Institute is completing its report. The assessment manual will be published.

Collection Overlap

William Gray Potter, University of Illinois, has undertaken research on collection overlap and diversity in academic libraries in Illinois. Twenty libraries using the Library Computer System, a shared circulation system, are participating in the study. Bibliographic records will be matched to discover the number of titles that libraries hold in common and the number of titles that are unique. Results are expected to be useful in planning cooperative projects and estimating the benefits of resource sharing.

Technology And Information Delivery Services

Late in 1982, the Alfred P. Sloan Foundation granted $400,000 to the Council for use over five years to explore the potential value for library operations and services of recently developed technologies. Computers, expanded communications capabilities, and new text storage systems promise to transform the support system for research, scholarship, and teaching during the next decade. Libraries and other components of the system of scholarly communication need to make wise use of technology to improve the way recorded information is assembled, preserved, and distributed. Because the technologies affect the processes involved and because the application of technology inevitably forces changes in established economic and organizational patterns, it is important that this topic be an integral part of the Council's program.

Funds are used in part to support CLR technical staff, which in turn allows the Council to provide assistance to some libraries considering major technical innovations. Several technical studies have been conducted in the bibliographic and information delivery programs and a number of individuals have been asked to assist CLR staff in assessing the current status and future prospects of specific technologies, relative especially to their application to library operations and their influence on costs. As this aspect of the Council's program develops, it is anticipated that a number of publications growing out of CLR-sponsored meetings will be prepared and distributed.

Information Delivery Services

Technology is changing the historical role of libraries as storehouses of information. Although all implications of these changes cannot be foreseen, a major objective is to maintain reliable access for all to information, regardless of format. Equality of access is not only intellectually desirable but essential from the public policy standpoint. On the assumption that technological and economic conditions will affect access, the Council outlined a new program to help protect the interests of users and improve the performance of information systems. In October 1982, the Ford Foundation provided initial funding.

Because many aspects of the topic are poorly understood, program staff have devoted much time to gathering information. A task force drawn from the library and

information service communities has assisted the Council in this work. With this help, it has been possible to establish priorities for future action, open discussions among some of the parties involved in information delivery, and ascertain at least some of the facts about costs and performance of existing systems.

The December 1982 beginning for this work was linked to a conference sponsored by CLR, the Association of American Universities, and the American Council of Learned Societies that brought together librarians, foundation representatives, and academic and administrative university officers to consider a number of issues of importance to research libraries. The Wingspread discussions[1] ranged widely, but the matter of access to information and the implications of technology and organizational changes for access dominated the sessions. Electronic publishing, the evaluation of alternative technology-based systems for delivery of information, the economic analysis of optional organizational structures for delivery of documents, and the development and utility of databases and machine-stored text are examples of specific topics that were identified for future attention.

If Wingspread affirmed the need for this CLR program, the following seven months' experience have validated the timing of the effort. The effects of budget reductions on library services, organizational changes, the development of cooperative ventures, the rapid entry of commercial interests into segments of the information delivery system, efforts to extend interpretation of copyright law to accommodate new delivery systems, compensation for access to collections and charges for users, and renewed commitments to establish shared responsibility for collecting (and hence shared responsibility for delivery as well) are examples of issues that need attention. Several projects, described below, have been funded to address pertinent topics.

Telefacsimile Study

Information Systems Consultants, Inc. (ISCI), was awarded a CLR contract to report on the potential of telefacsimile to help improve interlibrary loan services. Richard Boss and Judy McQueen of ISCI submitted a paper, "Telefacsimile as a Means of Improving Interlibrary Document Delivery," which evaluates currently available equipment, alternative delivery mechanisms, and anticipated developments over the next two to three years.

Document Delivery Survey

Finding that information on the methods libraries use to obtain materials for their patrons is poorly reported, the Library of Congress Network Advisory Committee recommended that the Council fund a study of current document delivery activities. After requesting proposals from a number of interested agencies, CLR contracted with Information Systems Consultants to describe current interlibrary loan activity. ISCI will review the literature on document delivery, assess the types of data that can

[1]Wingspread was the site of the conference. For further information on the Wingspread discussions, see page 37.

be collected, survey the full spectrum of providers of services, and make recommendations for additional analysis.

National Collections Inventory Project (NCIP)

In July 1983, the Association of Research Libraries (ARL) will begin a project to develop tools and procedures needed to describe collections across a wide spectrum of research libraries. The base for this effort is a Research Libraries Group (RLG) program to develop a collections conspectus—a brief description of collecting strengths and current collecting interests of its member libraries.

Working in conjunction with the RLG Collection Management and Development Committee, the ARL Task Force on Collection Development has tested the conspectus for wider use. Five ARL members (none of which is an RLG member) participated, with favorable results, and the Task Force concluded that it would be feasible to build an inventory of significant research collection strengths in North America. The inventory might be of use as a basis for the development of coordinated collecting policies, as a guide for scholars, and as a finding guide for interlibrary loan. CLR funding will be used by ARL's Office of Management Studies to develop a manual for use by bibliographers and to design training programs for participants.

Information Needs of Graduate Students

Mona Farid and Eileen Snyder, Syracuse University, are conducting an investigation of the information-seeking behavior of students enrolled in Ph.D. programs. They will evaluate methods of gathering information during various stages of academic work, taking into consideration disciplinary affiliation, assistance from advisors, use of information sources other than libraries, and the influence of time limitations for working students. The team also will compare information gathering patterns of U.S. and foreign students. Findings are expected to improve understanding of research patterns and suggest implications for library collection development and user services.

International Programs And Special Projects

CLR international activities echo national concerns—establishing standards, removing barriers to the exchange of information, and furthering cooperation with those in related enterprises such as publishing and the book trade. Support frequently is channeled through organizations such as the International Federation of Library Associations and Institutions (IFLA) and the International Council on Archives (ICA). Both IFLA and ICA are increasing efforts to establish and maintain international standards and to assist developing countries in providing national bibliographic and archival services. CLR support is directed to new ventures and special projects rather than ongoing expenditures, and is made possible by a grant to the Council for its international program from the Exxon Education Foundation.

Two special projects (i.e., projects not a part of CLR's continuing programs) were prominent during 1983. A Committee on the Records of Government was established to consider public expectations for government records and the impact of technology on record generation and control. The second project reflects the Council's special interest in bringing together representatives from all parts of the system of scholarly communication to discuss common interests and issues that affect research libraries and scholarship. The Wingspread Conference and the upcoming Forum II were planned to further such discussion.

IFLA: International Cataloging in Publication (CIP)

Since its early years, CLR has encouraged cataloging in publication, first in the United States, and subsequently in other countries. In August 1982, the IFLA International Office for Universal Bibliographic Control, in association with UNESCO, organized an international meeting to consider currently operating CIP programs, projected new programs, and guidelines for resolving problems. The 50 invited participants included librarians, publishers, and others concerned with national bibliographic services. Council funding supported preparation of background papers and the final report, which will be published during 1983.

IFLA: International Standard Bibliographic Descriptions (ISBD)

Since 1971, a number of standard bibliographic descriptions have been developed, published, and incorporated into the practices of many national bibliographic agen-

cies as well as into national and multinational cataloging codes. In 1980, the Standing Committee of the IFLA Section on Cataloging authorized a review of the ISBDs that have been in place for at least five years, and in 1981 the Council funded a two-year review. Because the emphasis is on improving consistency and clarity rather than revising the texts, changes are expected to be minimal.

IFLA: Establishing National Bibliographic Structures

Seventy-eight of the 115 IFLA members are located in developing regions, where there is interest in establishing national bibliographic services. A 1981 CLR grant supported consultant services by the director of the International Office for UBC to assist these nations.[1] Under the grant, the director worked with the African Standing Conference on Bibliographic Control (ASCOBIC) on bibliographical activities, and during 1982 the UBC office undertook a survey of classification practices in African countries. Also, for the next meeting of the group, scheduled for August 1983, the office has prepared for UNESCO a *Manual of Bibliographic Control* intended to assist developing countries in producing national bibliographies, preparing bibliographic records, and participating in international programs such as the International Standard Book Number and International Standard Serial Number schemes. The manual will be published by UNESCO in mid-1983.

IFLA: Copyright and Library Materials for the Handicapped

Earlier CLR annual reports described IFLA efforts to establish guidelines for the use of copyrighted materials by handicapped readers.[2] The basis for new action was provided by Françoise Hébert and Wanda Nöel's *Copyright and Library Materials for the Handicapped*, a study prepared and published with CLR assistance. During fiscal 1983, Council funds were used to support a meeting of four international organizations interested in this specialized area of copyright law, and to send IFLA representatives to a UNESCO/World Intellectual Property Organization (WIPO) Working Group meeting in October 1982 in Paris. The Working Group drafted model legislation containing special provisions for access by handicapped persons to copyrighted works.

IFLA: Universal Access to Publications (UAP)

IFLA's UAP program is aimed at ensuring the availability of publications wherever they are needed, on an unrestricted basis. National plans for library and information services exist in many countries, but the plans seldom include consideration of document supply. The Office for UAP proposed guidelines to help individual countries plan library and information services in the context of known resources. The project report, *Guidelines on National Planning for the Availability of Publications*, was issued in May 1983.

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[1]See Annual Report XXVI:29.

[2]See Annual Report XXVI:28; XXV:42.

ICA: Management of Archival Institutions

In 1981, the Council funded preparation of a manual on the administration of archival institutions because reliable information on the subject is sparse and many archives administrators (particularly in the newly opened archives of Third World countries) have had relatively little experience. Dr. Cesar A. Garcia Belsunce, Director General of the Archivo General de la Nacion, Argentina, prepared the new *Manual on the Management of Archival Institutions*. The manuscript will be published by the Archives of Spain.

Dewey Decimal Classification—Arabic Edition

The Arab League Educational Cultural and Scientific Organization (ALECSO) has been working to produce an edition of the Dewey Decimal Classification for use in the Arab world. Dewey is the most widely used classification in the 22 Arab countries, but it has not previously been adapted to provide special coverage of Arab culture. Forest Press, publisher of the Dewey schedules, received a 1980 CLR grant in partial support of the project. The Arabic edition of Dewey was completed in 1982, and publication is expected next year.

Travel Grants

The Council occasionally provides travel grants for professional activities not funded by libraries or other agencies. In 1983, Anthony J. Loveday, secretary of the Standing Conference of National and University Libraries (SCONUL; the British equivalent of the Association of Research Libraries) and chair of the IFLA Section of University and Other General Research Libraries, received a CLR grant to cover some of the costs of his participation in the joint spring meeting of ARL and the Canadian Association of Research Libraries. Similarly, Rutherford D. Rogers, chair of the Programme Management Committee of IFLA, received funding to attend certain committee meetings. Reports were received on two other grants: a CLR-funded project to bring two staff members of the National Library of China to the Library of Congress for a six months' internship, and a grant to enable an IFLA Executive Board member from Malaysia to attend the International Congress on Universal Access to Publications (UAP) in Paris in May 1982.

The Records of Government

The Council, in cooperation with the American Council of Learned Societies and the Social Science Research Council, is sponsoring a Committee on the Records of Government. Funding for this enterprise has been received from the Andrew W. Mellon Foundation, the Rockefeller Foundation, the Alfred P. Sloan Foundation, and CLR. The Council will provide office space for project staff.

Chaired by Ernest R. May, Harvard University, the Committee will begin its 18-month inquiry in July 1983. Dr. Anna Nelson, George Washington University, is project director. Members of the Committee have been chosen for their wide experience in government, corporations, and other institutions.[1] Work will be

[1]Committee members are listed on page 41.

planned around two assumptions: first, that current records management procedures are inadequate for the enormous amount of documentation that exists, and second, that new technologies are changing the nature of government records. Computerized information management has stimulated the growth of large databases without printed counterparts, and the advent of word processing programs enables documents to be produced and even distributed without assurance that archival interests are considered.

The Committee's report will be issued by January 1, 1985, and will describe the present situation, define problems, and recommend solutions to help assure that the needs and expectations of the public for information about government operations and activities at all levels are met.

The Wingspread Conference and Forum II

In 1981, the Association of American Universities (AAU) and the Council began working together to investigate major issues facing research libraries. Funding was provided by the Carnegie Corporation, the Andrew W. Mellon Foundation, and the National Endowment for the Humanities. In December 1982, the project culminated in an invitational conference held at the Johnson Foundation facility at Wingspread, Racine, Wisconsin. The conference brought together 43 university officers, scholars, research librarians, and foundation representatives.

The underlying question that prompted these activities is "Can general research libraries adjust and refine current practices to cope with the technological, economic, and organizational issues that are inherent in the publishing and information service systems, or are fundamental changes required?" Titled "Toward the 21st Century: A Conference on Research Libraries and Their Users," the conference was planned as a national effort to address the library future. Participants paid special attention to the need to improve communications among librarians, users, and those who provide support. A series of reports on discussions at Wingspread is being published in *Library Issues*, and the Council also will issue a publication.

Conference participants asked the Council to establish a forum for the systematic examination of issues relating to research libraries and the system of scholarly communication. Accordingly, CLR has planned an October 1983 meeting to consider national aspects of research library collections and preservation.

University of Chicago Conference

The Council provided funding for the University of Chicago Graduate Library School's 42nd annual conference, "Publishing Today: Opportunities and Challenges in the Dissemination of New Knowledge and Literature." Held in the spring of 1983, the conference was planned to examine issues and problems facing publishers as agents in the search for and dissemination of knowledge. Participants with different views but common interests—librarians, scholars, and publishers—discussed the effects of publishing industry changes.

Program Committees, Task Forces, And Project Participants

Bibliographic Service Development Program Program Committee

Henriette Avram
Library of Congress
Rowland Brown
OCLC Online Computer Library Center
Joan Gotwals
University of Pennsylvania
James Govan
University of North Carolina
Carol Ishimoto
Harvard University
Frederick Kilgour
OCLC Online Computer Library Center
Richard McCoy
Research Libraries Group
Roderick Swartz
Washington State Library

Bibliographic Service Development Program Task Force on a Name Authority File Service

Raymond DeBuse
Washington Library Network
Joan Gotwals
University of Pennsylvania
Dorothy Gregor
University of California, Berkeley
Tina Kass
Research Libraries Group
Lillian Kozuma
National Library of Medicine
Penny Mattern
OCLC Online Computer Library Center
Lucia Rather
Library of Congress
Helen Schmierer
University of Chicago
Ruth Shipp
Seattle Public Library

Bibliographic Service Development Program Linked Systems Project

Library of Congress
Principal Investigator and Program Officer: Henriette Avram
Project Directors: Sally McCallum, Authorities
Ray Denenberg, Telecommunications

Research Libraries Group
Principal Investigator: Richard McCoy
Project Directors: Tina Kass, Authorities
Wayne Davison, Telecommunications

Washington Library Network
Principal Investigator: Roderick Swartz
Program Officer: Robert Payne
Project Directors: Raymond DeBuse, Authorities
Tom Brown, Telecommunications

Professional Education and Training for Research Librarianship
Program Committee

John McDonald, Chair
University of Connecticut
Russell Bidlack
University of Michigan
Margot McBurney
Queen's University
Rutherford Rogers
Yale University
Robert Vosper
University of California, Los Angeles

Professional Education and Training for Research Librarianship
Senior Fellows Program Participants

Class of 1982–83

Millicent Abell
University of California, San Diego
Jean Aroeste
Princeton University
Joan Chambers
University of California, Riverside
Richard Dionne
Yale University
Clinton Howard
University of Kansas
Marcia Jebb
Cornell University
Philip Leinbach
Tulane University
Beverly Lynch
University of Illinois, Chicago
Pat Molholt
Rensselaer Polytechnic Institute
Ronald Powell
University of Michigan
Ann Randall
Brown University
Barbara Smith
Pennsylvania State University
Paul Willis
University of Kentucky

Class of 1983–84

Joseph Dagnese
Purdue University
Laurent-G. Denis
University of Toronto
Kaye Gapen
University of Alabama
Dorothy Gregor
University of California, Berkeley
Frances Groen
McGill University
Irene Hoadley
Texas A & M University
David Laird
University of Arizona
Margot McBurney
Queen's University
Robert Miller
Notre Dame University
Paul Mosher
Stanford University
Ann Prentice
University of Tennessee
Frank Rodgers
University of Miami
Jordan Scepanski
Vanderbilt University
Richard Talbot
University of Massachusetts
Clyde Walton
University of Colorado
Howard White
Drexel University

Information Delivery Services Task Force

Jay Lucker
Massachusetts Institute of Technology
Richard McCoy
Research Libraries Group
David Penniman
OCLC Online Computer Library Center
Joseph Shubert
New York State Library
Donald Simpson
Center for Research Libraries
James Wood
Chemical Abstracts

Committee on Production Guidelines for Book Longevity

Herbert Bailey, Jr., Chair
Princeton University Press
Frank Burke
National Historical Publications and Records Commission
Warren Haas
Council on Library Resources
Peter Mollman
World Book-Childcraft International
Leonard Schlosser
Lindenmeyr Paper Corporation
David Stam
New York Public Library
Gay Walker
Yale University Library

Academic Library Management Intern Program 1983–84 Selection Committee

Fred Cole, Chair
Former president, CLR
Millicent Abell
University of California, San Diego
Linda Beaupré
University of Texas at Austin
Charles Churchwell
Washington University
Duane Webster
Association of Research Libraries, Office of Management Studies

Committee on the Records of Government

Ernest May, Chair
Harvard University
Richard Bolling
Boston College
Philip Buchen
Dewey, Ballantine, Bushby, Palmer & Wood
Joseph Califano, Jr.
Dewey, Ballantine, Bushby, Palmer & Wood
Phillip Hughes
Smithsonian Institution
Edward Levi
University of Chicago
Franklin Lindsay
ITEK Corporation

Publications Resulting From CLR-Supported Programs And Fellowships, 1982–1983

Part I. Programs

General

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Sheh Wong, William. "Rarity in Books, a Traditional Chinese Approach to Appreciation." *Libri* 32 (1982) 278–83. (CLR Fellow, 1977–78.)

ACTIVE PROJECTS
FINANCIAL STATEMENTS

CLR-Supported Projects Active in Fiscal 1983 (unaudited)

GRANTS AND CONTRACTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
American Library Association **Chicago, Ill.**				
Preservation conferences	$ -0-	$ 5,000	$ 5,000	$ -0-
Association of Research Libraries **Washington, D.C.**				
Academic Library Program	83,500	-0-	60,000	23,500
Collection assessment for small academic libraries	2,200	-0-	-0-	2,200
Atlanta College of Art Atlanta, Ga.	500	-0-	500	-0-
Dillard University New Orleans, La.	500	-0-	-0-	500
Tougaloo College Tougaloo, Miss.	500	-0-	-0-	500
Tuskegee Institute Tuskegee, Ala.	500	-0-	-0-	500
National Inventory of Research Collections, Phase I	-0-	23,427	-0-	23,427
ARL/RLG joint project on decision support systems for libraries	5,000	(5,000)	-0-	-0-
Nancy J. Bell **Baltimore, Md.**				
Conservation internships in the U.K.	-0-	2,500	-0-	2,500
Jovana J. Brown **Olympia, Wash.**				
Study of the funding of academic library research in Britain	1,000	-0-	1,000	-0-
Carleton College **Northfield, Minn.**				
Index to microform collections	-0-	2,250	2,000	250

GRANTS AND CONTRACTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
C. Donald Cook Toronto, Canada				
Study of forms of AACR2 catalog headings used by national libraries	5,000	-0-	-0-	5,000
Council of National Library and Information Associations Haverford, Pa.				
Support of American National Standards Committee Z-39	5,000	-0-	2,500	2,500
Duke University Durham, N.C.				
Research on Byzantine bindings	2,500	-0-	-0-	2,500
Earlham College Richmond, Ind.				
Periodical list for *Choice*	2,200	(2,200)	-0-	-0-
6th conference on bibliographic instruction	1,700	-0-	1,700	-0-
7th conference on bibliographic instruction	7,500	-0-	7,500	-0-
Forest Press Albany, N.Y.				
Investigation of the need for an Arabic edition of the Dewey Decimal Classification	2,070	-0-	-0-	2,070
International Council on Archives Paris, France				
Special projects	4,500	-0-	4,500	-0-
International Federation of Library Associations and Institutions, The Hague, Netherlands				
Guidelines for national UAP planning, policy, and development	-0-	3,500	3,500	-0-
IFLA representation at UNESCO/WIPO meeting	-0-	2,000	2,000	-0-
Report on copyright and materials for the handicapped	1,000	-0-	-0-	1,000
Review of international standard bibliographic descriptions	2,500	-0-	-0-	2,500
Special projects	32,000	(2,000)	10,000	20,000

GRANTS AND CONTRACTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
Library of Congress **Washington, D.C.** Travel grant for L.C. representative at British conference on resource sharing	1,000	-0-	1,000	-0-
Anthony J. Loveday **London, England** Travel grant to ARL/CARL conference	-0-	1,500	1,500	-0-
Ellis Mount **Teaneck, N.J.** Revision of *University Science and Engineering Libraries*	-0-	2,250	1,500	750
Ohio State University **Columbus, Ohio** Colloquium on library user education	-0-	4,500 (3,930)	570	-0-
Rutherford D. Rogers **New Haven, Conn.** Travel grant to chair IFLA Programme Management Committee	1,308	-0-	1,308	-0-
Society of American Archivists **Chicago, Ill.** Pilot project for self-study and peer review of archives	1,670	-0-	1,670	-0-
University of Chicago **Chicago, Ill.** 42nd annual GLS conference—*Publishing Today*	-0-	14,300	12,000	2,300
University of Illinois **Champaign, Ill.** Collection overlap and diversity in the LCS network in Illinois	-0-	6,500	-0-	6,500
University of Michigan **Ann Arbor, Mich.** Study of the relationship between bibliographic access to stored materials and faculty attitude and use	31,747	-0-	-0-	31,747

GRANTS AND CONTRACTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
Virginia Polytechnic Institute and State University Blacksburg, Va.				
Research on use of library materials	2,310	-0-	-0-	2,310
Whittier College Whittier, Calif.				
Bibliographic instruction workshop	-0-	3,000	-0-	3,000
Subtotals	$197,705	$ 70,727 (13,130)	$119,748	$135,554

COUNCIL-ADMINISTERED PROJECTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
Academic Library Management Intern Program				
1981–82	$ 2,231	$ -0-	$ 2,231	$ -0-
Bibliographic Service Development Program				
Association of Research Libraries, Washington, D.C.				
ARL microforms project	10,000	-0-	8,000	2,000
CONSER A&I coverage project	-0-	75,500	-0-	75,500
Boston Theological Institute Cambridge, Mass.				
Increasing access to theological journal literature	3,431	-0-	3,431	-0-
Pauline Cochrane Fayetteville, N.Y.				
Developing an improved entry vocabulary for Library of Congress subject headings	7,484	(174)	7,310	-0-
Council of National Library & Information Associations Haverford, Pa.				
Support of American National Standards Committee Z-39	10,000	-0-	5,000	5,000
Dartmouth College Library Hanover, N.H.				
Participant in joint project to evaluate online public access catalogs	5,419	-0-	4,500	919
Giok Po Oey				
Travel grant to explore romanization of Southeast Asian language material	-0-	2,200	2,200	-0-
Library of Congress Washington, D.C.				
Joint project for authorities implementation	221,998	(32,513)	40,000	149,485
Joint project—bibliographic analysis—Linked Systems	-0-	4,620	1,500	3,120
LC participation—SNI Project (session and transport layers design)	-0-	24,576	24,576	-0-

COUNCIL-ADMINISTERED PROJECTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
Library of Congress Washington, D.C.				
Participant in joint project to evaluate online public access catalogs	6,351	(1,351)	5,000	-0-
Preparation of Intersite Test Plan for SNI	-0-	24,576	24,576	-0-
Protocol Layer Interface Design—Standard Network Interconnection Project	-0-	25,000	25,000	-0-
Telenet connection for SNI development	-0-	8,500	8,500	-0-
Travel costs re. the Linked Systems Project (with RLG & WLN)	10,239	-0-	6,484	3,755
J. Matthews and Asscciates Grass Valley, Calif.				
Detailed analysis of the CLR online catalog data	-0-	27,000	-0-	27,000
Participant in joint project to evaluate online public access catalogs	60,770	(32,211)	28,559	-0-
Northwestern University Evanston, Ill.				
Canadian interface—application level protocol	4,500	(402)	4,098	-0-
Development of an application level protocol	6,000	(947)	5,053	-0-
Educating the catalog user: a model for instructional development and evaluation	-0-	57,000	15,000	42,000
Participant in joint project to evaluate online public access catalogs	1,260	(1,260)	-0-	-0-
OCLC Online Computer Library Center, Dublin, Ohio				
Participant in joint project to evaluate online public access catalogs	14,000	-0-	14,000	-0-
Pittsburgh Regional Library Center, Pittsburgh, Pa.				
Serials cancellation project	9,000	-0-	7,500	1,500

COUNCIL-ADMINISTERED PROJECTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
The Research Libraries Group Stanford, Calif.				
Joint project for authorities implementation	342,528	(38,283)	60,000	244,245
Joint project—bibliographic analysis—Linked Systems	-0-	16,470	5,000	11,470
Joint project for Standard Network Interconnection	296,250	-0-	98,750	197,500
Participant in joint project to evaluate online public access catalogs	2,614	-0-	2,614	-0-
Planning the integration of MRDF into the Research Libraries Information Network	-0-	7,000	-0-	7,000
Toward the formation of a nationwide authority file service (joint project with WLN & LC)	16,554	-0-	-0-	16,554
Rutgers University New Brunswick, N.J.				
Inventory of machine-readable texts in the humanities	14,166	-0-	1,913	12,253
Stanford University Libraries Stanford, Calif.				
Participant in joint project to evaluate online public access catalogs	1,960	(1,960)	-0-	-0-
University of California Berkeley, Calif.				
Analysis of data collected in the online catalog evaluation project	53,000	3,140	29,237	26,903
Features and costs of online catalogs: The state of the art	-0-	17,500	12,000	5,500
Participant in joint project to evaluate online public access catalogs	1,000	-0-	-0-	1,000
University of Florida Foundation, Inc. Gainesville, Fla.				
Invitational conference on the MARC format for holdings and locations	-0-	8,550	8,550	-0-

COUNCIL-ADMINISTERED PROJECTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
University of Georgia Research Foundation Athens, Ga.				
Analysis of subsets of data gathered in the online public access catalog study	-0-	2,500 (500)	2,000	-0-
University of Illinois Urbana, Ill.				
Analysis of MARC database statistics	15,570	-0-	15,570	-0-
University of Kentucky Research Foundation Lexington, Ky.				
Second edition of *Library of Congress Subject Headings: Principles and Applications*	-0-	3,860	1,500	2,360
University of Michigan Ann Arbor, Mich.				
A system for creating and maintaining bibliographies	6,500	7,000	6,000	7,500
Washington Library Network Olympia, Wash.				
Joint project for authorities implementation	323,347	(49,546)	60,000	213,801
Joint project—bibliographic analysis—Linked Systems	-0-	9,887	3,000	6,887
Joint project for standard network interconnection	247,500	-0-	-0-	247,500
Toward the formation of a nationwide authority file service (joint project with RLG & LC) Phase 1	15,000	-0-	15,000	-0-
Toward the formation of a nationwide authority file service (joint project with RLG & LC) Phase 2	45,549	-0-	45,549	-0-
Total Bibliographic Service Development Program	$1,751,990	$ 324,879 (159,147)	$ 606,970	$1,310,752

COUNCIL-ADMINISTERED PROJECTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
Information Delivery Services Program				
Association of Research Libraries, Washington, D.C.				
National Inventory of Research Collections, Phase I	-0-	23,428	-0-	23,428
Information Systems Consultants, Inc. Bethesda, Md.				
Document delivery survey, Phase I	-0-	12,800	10,000	2,800
Telefacsimile as a Means of Improving Interlibrary Document Delivery	-0-	600 (2)	598	-0-
Syracuse University Syracuse, N.Y.				
Information-seeking behavior of Ph.D. students in selected disciplines	-0-	3,000	3,000	-0-
Total Information Delivery Services	-0-	$ 39,828 (2)	$ 13,598	$ 26,228
Professional Education and Training for Research Librarianship (PETREL)				
Faculty/Librarian Cooperative Research Projects—Phase I				
Iowa State University	-0-	650	650	-0-
Indiana University	-0-	2,995	2,995	-0-
Michigan State University	-0-	2,800	2,800	-0-
Rutgers University	-0-	3,000	3,000	-0-
State University of New York	-0-	3,000	3,000	-0-
Syracuse University	-0-	2,000	2,000	-0-
University of California	-0-	3,000	3,000	-0-
University of Illinois	-0-	2,026	2,026	-0-
University of Oklahoma	-0-	2,930	2,930	-0-
Vanderbilt University	-0-	3,000	3,000	-0-
Wayne State University	-0-	3,000	3,000	-0-

COUNCIL-ADMINISTERED PROJECTS

	Unpaid 6/30/82	FY 1983 Grants (Adjustments)	FY 1983 Payments	Unpaid 6/30/83
Faculty/Librarian Cooperative Research Projects—Phase II				
University of Iowa	-0-	3,000	3,000	-0-
University of Minnesota	-0-	3,000	-0-	3,000
University of Tennessee	-0-	2,500	2,500	-0-
University of Western Ontario	-0-	1,950	1,950	-0-
Vanderbilt University	-0-	3,000	3,000	-0-
Lauren Kelly Los Angeles, Calif. Senior Fellows program	4,500	-0-	4,500	-0-
University of British Columbia Vancouver, B.C. Frontiers Conference II—Changing Technology	-0-	33,000	25,000	8,000
University of California Los Angeles, Calif. Senior Fellows program				
1982–83	120,500	-0-	63,907	56,593
1983–85	127,000	-0-	-0-	127,000
Frontiers Conference	40,000	-0-	-0-	40,000
University of Chicago Chicago, Ill. Special program of advanced study in library management	235,000	-0-	107,000	128,000
University of Michigan Ann Arbor, Mich. Basic professional education for research librarianship	233,000	50,000	103,415	179,585
Total PETREL	$ 760,000	$ 124,851	$ 342,673	$ 542,178
Total CLR-administered projects	2,514,221	489,558 (159,149)	965,472	1,879,158
Subtotals from page 51	197,705	70,727 (13,130)	119,748	135,554
TOTALS	$2,711,926	$ 560,285 (172,279)	$1,085,220	$2,014,712

Opinion of Independent Accountant

August 5, 1983

To the Board of Directors of
Council on Library Resources, Inc.

In our opinion, the accompanying balance sheets and the related statements of revenues, expenses, and changes in fund balances and changes in cash and short-term investments present fairly the financial position of the Council on Library Resources, Inc. at June 30, 1983 and 1982, and the results of its operations and the changes in its cash and short-term investments for the years then ended in conformity with generally accepted accounting principles consistently applied. Our examinations of these statements were made in accordance with generally accepted auditing standards and accordingly included such tests of the accounting records and such other auditing procedures as we considered necessary in the circumstances.

Our examinations were made for the purpose of forming an opinion on the basic financial statements taken as a whole. The supplementary statement of revenues, expenses, and changes in fund balances for the years ended June 30, 1983 and 1982, is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information has been subjected to the auditing procedures applied in the examinations of the basic financial statements and, in our opinion, is fairly stated in all material respects in relation to the basic financial statements taken as a whole.

Price Waterhouse
Washington, D.C.

COUNCIL ON LIBRARY RESOURCES, INC.

Balance Sheets

	JUNE 30	
	1983	1982
ASSETS		
Cash and short-term investments	$3,634,269	$2,751,266
Grants receivable (Note 2)	3,412,592	3,266,411
Prepaid expenses and deposits	9,887	5,661
Total assets	$7,056,748	$6,023,338
LIABILITIES AND FUND BALANCE		
Deferred income (Note 2)	$3,544,785	$1,777,908
Grants and contracts payable	2,014,712	2,711,926
Accounts payable and accrued employee benefits	63,462	86,800
Federal excise taxes payable	4,837	6,638
Total liabilities	5,627,796	4,583,272
Unrestricted fund balance		
Appropriated	942,703	681,443
Unappropriated	486,249	758,623
Total fund balance	1,428,952	1,440,066
Total liabilities and fund balance	$7,056,748	$6,023,338

COUNCIL ON LIBRARY RESOURCES, INC.

Statement of Revenues, Expenses and Changes in Fund Balance

FOR THE YEARS ENDED JUNE 30, 1983 AND 1982

	Unrestricted	Restricted	Total
Fund balance, June 30, 1981	$1,214,411		$1,214,411
Revenues (Note 2)			
Grants and contracts	700,000	$2,113,806	2,813,806
Investment income	330,510		330,510
Royalty income	1,401		1,401
Total revenues	1,031,911	2,113,806	3,145,717
Expenses (Note 2)			
Program services	482,577	2,113,806	2,596,383
Administrative services	323,679		323,679
Total expenses	806,256	2,113,806	2,920,062
Excess of revenues over expenses	225,655		225,655
Fund balance, June 30, 1982	1,440,066		1,440,066
Revenues (Note 2)			
Grants and contracts	250,000	748,995	998,995
Investment income	241,571		241,571
Royalty income	286		286
Total revenues	491,857	748,995	1,240,852
Expenses (Note 2)			
Program services	197,866	679,023	876,889
Administrative and support services	305,105	69,972	375,077
Total expenses	502,971	748,995	1,251,966
Deficiency of revenues over expenses	(11,114)		(11,114)
Fund balance, June 30, 1983	$1,428,952	$	$1,428,952

COUNCIL ON LIBRARY RESOURCES, INC.

Statement of Changes in Cash and Short-term Investments

FOR THE YEARS ENDED JUNE 30, 1983 AND 1982

	1983	1982
(Uses) sources of cash and short-term investments		
(Deficiency) excess of revenues over expenses	$ (11,114)	$ 225,655
Increase (decrease) in deferred income	1,766,877	(1,993,053)
	1,755,763	(1,767,398)
Uses of cash and short-term investments		
Increase (decrease) in grants receivable	146,181	(1,266,276)
Decrease (increase) in grants and contracts payable	697,214	(623,992)
Decrease (increase) in federal excise taxes, accounts payable, and accrued employee benefits	25,139	(45,903)
Increase (decrease) in prepaid expenses and deposits	4,226	(21,574)
	872,760	(1,957,745)
Increase in cash and short-term investments for the year	883,003	190,347
Cash and short-term investments, beginning of year	2,751,266	2,560,919
Cash and short-term investments, end of year	$3,634,269	$2,751,266

COUNCIL ON LIBRARY RESOURCES, INC.

Notes to Financial Statements

JUNE 30, 1983 AND 1982

1. Organization

The Council on Library Resources, Inc. (Council) is a nonprofit organization incorporated under the laws of the District of Columbia in 1956 for the purpose of promoting library research. During fiscal years 1983 and 1982, the Council's operations were financed through unrestricted general support grants from The Ford Foundation and The Andrew W. Mellon Foundation and through several restricted grants from private foundations and other sources. The Council conducts its work through directly administered projects as well as grants to and contracts with other organizations or individuals.

The Council is a private operating foundation and is exempt from Federal income tax under Internal Revenue Code section 501(c)(3). It is, however, subject to a 2% excise tax on investment and royalty income under the provisions of the Revenue Act of 1978.

2. Summary of Significant Accounting Policies

The Council's financial statements are prepared on an accrual basis. Grants are recorded as receivable at such time as the Council is notified that it has been awarded the funds. Unrestricted grant revenue is recognized in accordance with the budgeted annual payments specified by the grantors. Interest and royalty income are recognized as unrestricted grant revenue. Restricted grant revenue is recognized to the extent of the related expenses. Grant and contract expenses are recorded when the recipients are notified that they are to receive the funds. All unrecognized grant revenue is recorded as deferred income. Short-term investments consist of certificates of deposit, a money market fund and treasury bills at amortized cost.

The costs of office furniture and equipment are consistently charged to expense when incurred. The Council does not consider such expenditures to be sufficiently material to warrant capitalization and depreciation.

3. Retirement Plan

Employees are eligible for participation in the Council's retirement annuity program, which is administered through the TIAA/CREF insurance companies. Individual contracts issued under the plan provide for full and immediate vesting of both the Council's and employees' contributions. The Council's contribution amounted to $66,000 and $56,000 for fiscal years 1983 and 1982, respectively.

4. Commitments

The Council entered into a lease agreement for office space expiring in 1987 which may be cancelled after the expiration of three years, with one year notice. The minimum future rentals as of June 30, 1983 are $132,180 for fiscal year 1984 and $121,165 for fiscal year 1985.

In September 1982, the Council entered into an agreement to sub-lease a portion of its leased office space. The rent income from the sub-lease amounted to approximately $23,000 in fiscal year 1983 and was used to offset office rent expense.

COUNCIL ON LIBRARY RESOURCES, INC.

SUPPLEMENTARY STATEMENT OF REVENUES, EXPENSES AND CHANGES IN FUND BALANCES

FOR THE YEARS ENDED JUNE 30, 1983 AND 1982

	Restricted Funds						Unrestricted Funds					
	Bibliographic Service (Note 2)	Information Delivery (Note 3)	Professional Education (Note 4)	Technology Assessment (Note 5)	General Programs (Note 6)	Total Restricted	Ford Foundation	Mellon Foundation	Other Sources	Total Unrestricted	Total 1983	Total 1982
Revenues												
Grants and contracts	$381,644	$100,060	$175,692	$39,933	$51,666	$748,995		$250,000		$ 250,000	$ 998,995	$2,813,806
Investment and royalty income									$ 241,857	241,857	241,857	331,911
Total revenues	381,644	100,060	175,692	39,933	51,666	748,995		250,000	241,857	491,857	1,240,852	3,145,717
Expenses (Note 1)												
Council-administered projects	199,456	42,741	33,348	22,440	15,807	313,792		22,455		22,455	336,247	229,057
Grants and contracts net of restorations and refunds	164,693	39,826	124,851		35,859	365,231		6,094		6,094	371,325	2,102,885
Program services							$109,381	59,936		169,317	169,317	264,441
Administrative and support services	17,493	17,493	17,493	17,493		69,972	300,268		4,837	305,105	375,077	323,679
Total expenses	381,644	100,060	175,692	39,933	51,666	748,995	409,649	88,485	4,837	502,971	1,251,966	2,920,062
(Deficiency) excess of revenue over expenses							(409,649)	161,515	237,020	(11,114)	(11,114)	225,655
Fund balance beginning of year							409,649	163,330	867,087	1,440,066	1,440,066	1,214,411
Fund balance end of year	$	$	$	$	$			$324,845	$1,104,107	$1,428,952	$1,428,952	$1,440,066

COUNCIL ON LIBRARY RESOURCES, INC.

Notes to Supplementary Statement of Revenues, Expenses and Changes in Fund Balances

FOR THE YEARS ENDED JUNE 30, 1983 AND 1982

1. **Allocation of Expenses**

Under the terms of the Ford and Mellon Foundations' unrestricted general support grants, the Council must account for expenditures of these funds on an individual basis. The Council allocates these expenses between the Ford and Mellon grants in accordance with the terms of the individual grants. Unrestricted expenses related to investment and royalty income are excluded from the Ford and Mellon allocation process.

2. **Bibliographic Services**

Funding awarded to the Council for its Bibliographic Service Development Program totaled $5,800,000 as of June 30, 1983. Funding was received from the Carnegie Corporation of New York, The Commonwealth Fund, The Ford Foundation, The William and Flora Hewlett Foundation, the Lilly Endowment, Inc., The Andrew W. Mellon Foundation, the National Endowment for the Humanities and the Alfred P. Sloan Foundation. The multi-year program is designed to assist the research library community in establishing the major components of a comprehensive, nationwide bibliographic system.

3. **Information Delivery**

A Ford Foundation grant made in the fall of 1982 enabled the Council to expand work in a program area designed to improve all aspects of the delivery of library materials and information to users.

4. **Professional Education**

A grant to the Council from the Pew Memorial Trust, combined with previous grants from the Carnegie Corporation of New York and The Andrew W. Mellon Foundation, permitted the extension of this program to support imaginative and promising efforts to improve both basic and ongoing professional education for research librarians.

5. **Technology Assessment**

An Alfred P. Sloan Foundation grant for use over five years provides partial funding to enable the Council to commission technical studies, sponsor meetings of specialists to consider the promise and impact of recent technologies on library operations and services, publish and distribute technical reports, and maintain specialized staff and consultative assistance.

6. **General Program**

The general program includes several restricted funds dedicated to certain specialized Council activities. Restricted funds from the Exxon Education Foundation provide general support of the Council's international activities. A five-year grant from the Carnegie Corporation provides support for projects to improve the management of research libraries. The Carnegie Corporation, The Andrew W. Mellon Foundation and the National Endowment for the Humanities have awarded funds to the Council and the Association of American Universities for a joint project to promote better communication and to stimulate cooperative activities among librarians, publishers, and the scholarly community.

COUNCIL ON LIBRARY RESOURCES, INC.

Grant Application Procedures

Initial inquiries regarding possible project support should be in the form of a letter, which should include the following information:

1. Name and address of requesting individual or organization, and the name of the proposed principal investigator.
2. Type of institution.
3. Tax status.
4. A clear statement of the aims of the project and its significance, including details of the general approach and specific research methods to be used.
5. Amount of request and proposed budget for the project.
6. Period to be covered by the project.

With this information, each proposed project can be evaluated in terms of how it fits the Council's current program priorities. If a project is judged to be of possible interest, advice will be offered as to proposal preparation, and additional information may be requested. There are no deadlines for general grant applications.

All inquiries should be addressed to: Warren J. Haas, President, Council on Library Resources, Inc., 1785 Massachusetts Ave., N.W., Washington, D.C. 20036.

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